

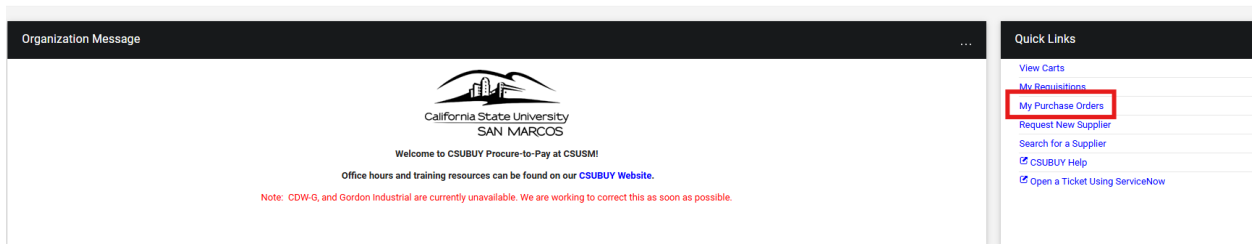
Change Request Process Guide

A Change Request (formally known as a Purchase Order Amendment - POA) allows requestors to make changes to a PO that has already completed workflow. A Requestor can initiate a Change Request to make changes to a PO when the PO is not in a closed status. A Change Request cannot be made for Punchout Suppliers.

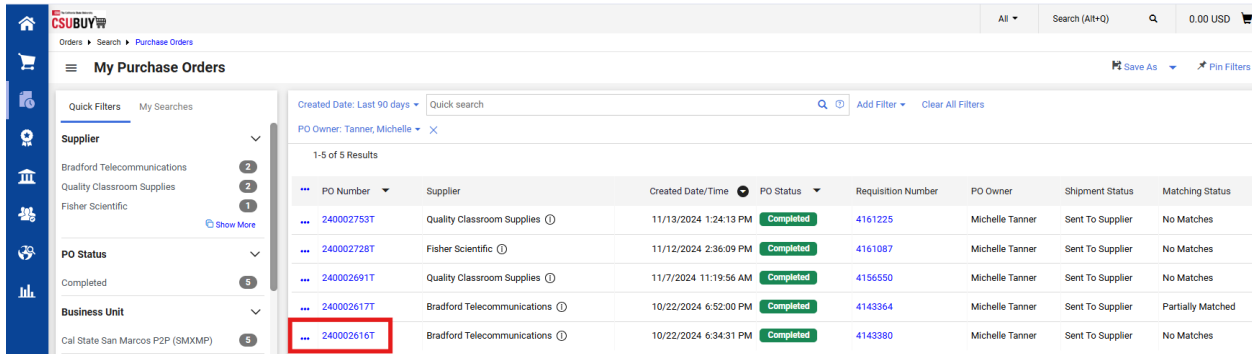
Follow these steps to create a Change Request. Note: If you are adding a line to a PO, scroll down to page 7 for instructions.

1. From the P2P home page, navigate to My Purchase Orders in the Quick Links section (or use the flyout menu).

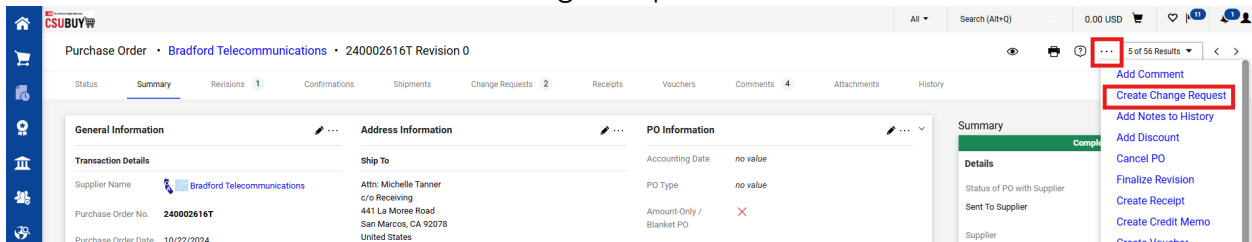
Shop · Shopping Home Page



2. Select the PO you need to make changes to.



3. Click the ... and select Create Change Request



4. Select the users that you want to notify. If the recipient is not listed, click Add recipient to add them.

Enter the Change Request Reason. Be very specific about what changes you are requesting to the Requisition/PO and attach supporting documents for the change.

Click Create Change Request.

Create Change Request

This will create a change request for this purchase order. If you select a user they will receive an email indicating that a change request has been created for this purchase order.

Email notification(s) | **Add recipient**

Michelle Tanner (Prepared by, Prepared for) <mtanner@csusm.edu>

Tu McClurg (Approved Requisition) <fbcfsprq@calstate.edu>

User with change request permission:

Bernice Choo (Approved) <bchoo@calstate.edu>

Kara Bush (Approved) <fbcfsprq@calstate.edu>

Madhuri Dhadge (Approved) <mdhadge@calstate.edu>

Travis Vasceannie (Approved) <travis.Vasceannie@risenow.com>

Vipin Jenraj (Approved) <vjenraj@calstate.edu>

add email recipient...

Change Request Reason

Change requested to update the \$ amount on line 1. The original quote expired before the requisition was approved.

885 characters remaining [expand](#) | [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

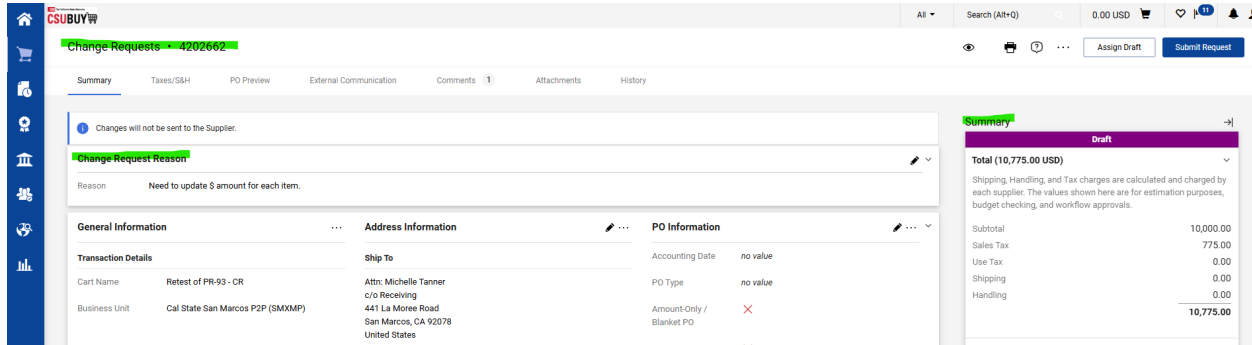
Attach file to this change request (optional):

Attachment Type File Link/URL

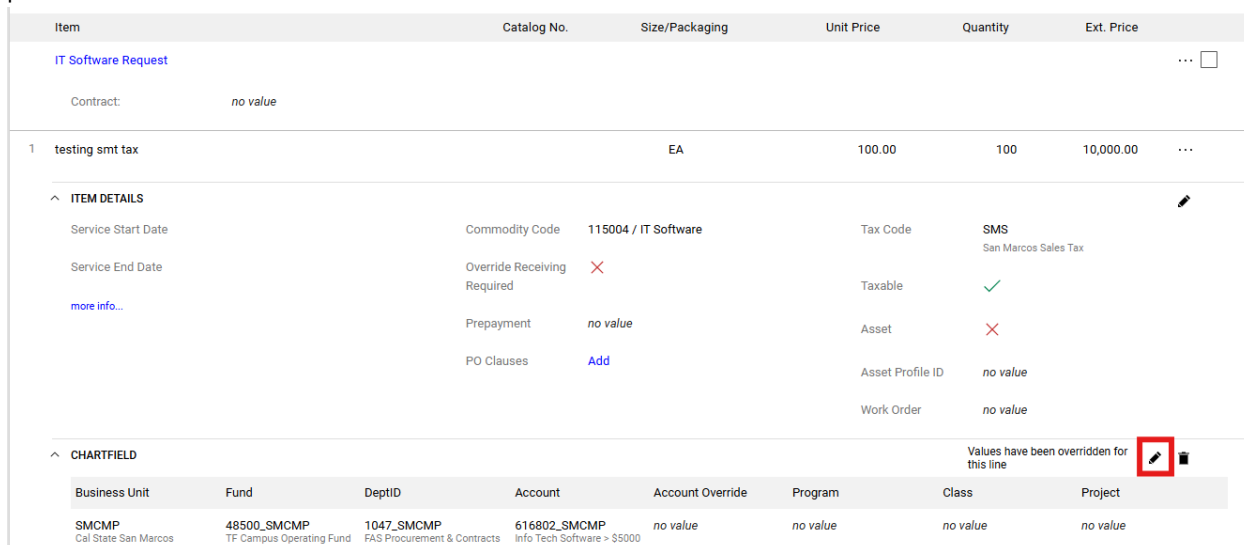
Create Change Request Close

IF YOU ARE ADDING A LINE TO YOUR PO SKIP TO STEP 14. FOR ALL OTHER CHANGES, CONTINUE WITH STEP 5.

5. This will open your original requisition in the Change Request to allow for changes by way of the edit pencils.

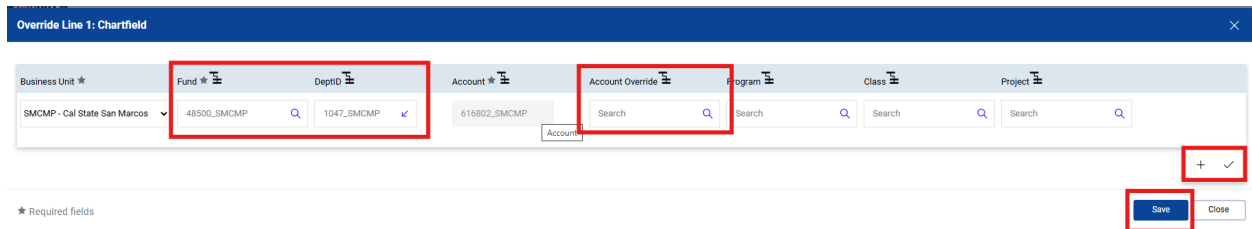


6. To make changes to your charfield, scroll down to the chartfield lines, click the pencil.



7. You can change the Fund, Dept ID, add an Account Code Override, or split the fund (+).

Once you have made the changes, click on the checkmark to validate then click Save.



8. To make changes to the \$ amount, quantity, product description, etc., click on the form name.

CSUBUY

Change Requests • 4202662

Summary Taxes/S&H PO Preview External Communication Comments 1 Attachments Histor

Ad-Hoc Approver [Select](#)

100 Items

Bradford Telecommunications · 100 Items · 10,000.00 USD

^ **SUPPLIER DETAILS** Cal State San Marcos P2P (SMXMP-1) : 5151 State University Drive, Chico, California 95926 United States

Contract *no value* Supplier Account No. *no value*

Quote number *no value* PO Clauses

Item	Catalog No.	Size/Packaging
IT Software Request		
Contract:	<i>no value</i>	
1 testing smt tax		EA

^ **ITEM DETAILS**

Service Start Date Commodity Code 115004 / IT Software

Service End Date Override Receiving Required **X**

9. Click on Cost Details to get to the cost information.

CSUBUY

Shop > Shopping > View Forms

[Back to Change Request](#)

IT Software Request

Form Number **1061003**

Purpose **Procurement Request**

Status **On Document**

Instructions

Suppliers

Form Fields

General IT Software Infor...

Information Security

Additional Supplier Infor...

[Cost Details](#)

Review and Submit

Instructions

Utilize this form to init

This form should not I

- is for IT Hardw
- Is for general g
- Is for goods an
- Is a request for
 - Note: or
- Is for services

Note: A supplier mus

10. Make edits to the Cost Details as applicable then click Save on Change Request.

Please review your campus Procurement policy for any required quotes or documentation to accompany this Requisition.

IT Software or Maintenance Details

Software Details

Unit Price ★	<input type="text" value="100.00"/>	USD	Quantity ★	<input type="text" value="100"/>	Total	10,000.00 USD
Unit of Measure ★	<input type="text" value="EA - Each"/>					
Product Description ★	<input type="text" value="testing smt tax"/>					
985 characters remaining						
Taxable	Yes					
Catalog No.	<input type="text"/>					
Commodity Code ★	115004 - IT Software					

[< Previous](#) [Save on Change Request](#) [Next >](#)

11. Click Back to Change Request to get out of the form.

CSUBUY
Shop ▶ Shopping ▶ View Forms

[< Back to Change Request](#)

IT Software Request

Form Number	1061003
Purpose	Procurement Request
Status	On Document

- Instructions
- Suppliers
- Form Fields
 - General IT Software Infor...
 - Information Security
 - Additional Supplier Infor...
 - Cost Details**

Form Fields - Cost Details

On This Page

- [Quotes & Other Attachments \(4\)](#)
- [IT Software or Maintenance Details \(4\)](#)

Quotes & Other Attachments

Please upload all required documentation for the acquisition.

- Quote(s) you received
- Accessibility documentation, including VPATs and
- Any other supporting documents for this requisition

12. All Change Requests require Attachments (revised quote, etc.) and/or Internal Notes.

To add Internal Notes, click the pencil, add your notes, then Save.

To add an Attachment, click Add, add your attachments, then Save. Note: If you have multiple files to attach you will need to repeat this step for each attachment.

CSUBUY

Change Requests • 4202662

Summary Taxes/S&H PO Preview External Communication Comments 1 Attachments History

Bill To

Accounts Payable, CSU San Marcos
accounts payable@csusm.edu
San Marcos, CA 92096
United States

Chartfield

Values vary by line.

Other Participant Information

Prepared by Michelle Tanner
Prepared for Michelle Tanner
Buyer 68000117876
Michelle Tanner
Ad-Hoc Approver Select

Internal Notes and Attachments

Internal Note no value
Internal Attachments Add

13. Once all changes are made, click Submit Request. Once the Change Request is submitted, it will be routed through the original workflow again.

Assign Draft Submit Request

Summary Draft

Total (10,667.25 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

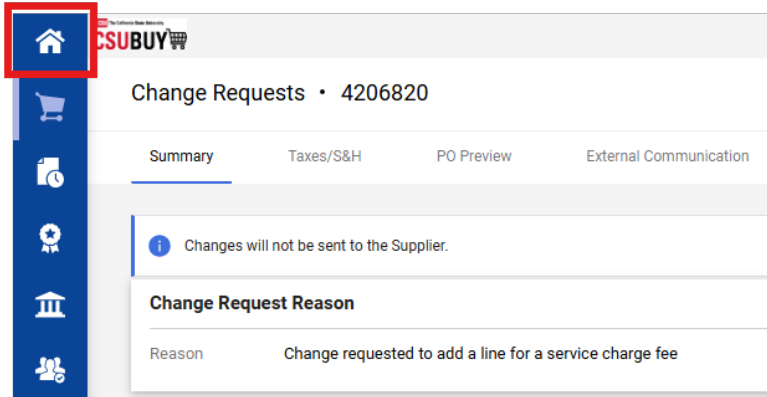
Subtotal	9,900.00
Sales Tax	767.25
Use Tax	0.00
Shipping	0.00
Handling	0.00
	10,667.25

To add line to a PO

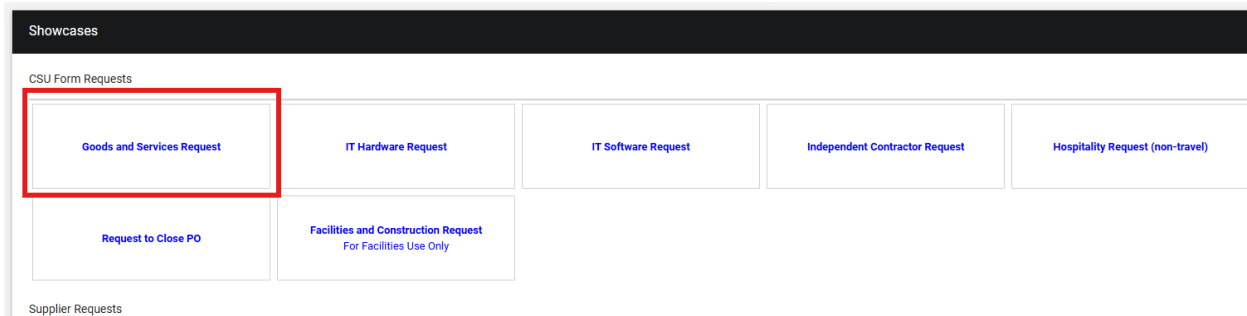
An item (line) can only be added to Purchase Orders that are owned by the logged-in user and that have the same Supplier and Fulfillment Center as the item(s) to be added.

14. Complete steps 1 – 4 above. This will open your original requisition in the Change Request. Take note of the Change Request number as you will need to refer to it in a later step.

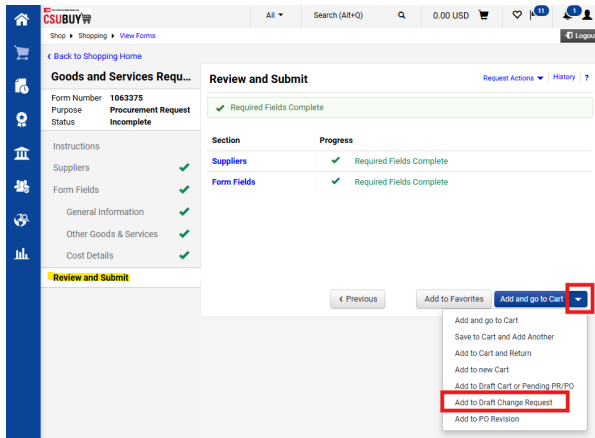
15. Click on the home icon in the flyout to return to the Shopping Home Page.



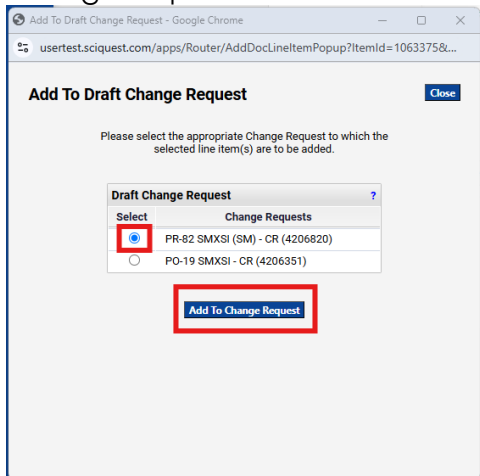
16. Click on the appropriate CSU Form Request type. The Form Request must align with the Form Request Type of the original Purchase Order (PO), if not, an error message will be displayed.



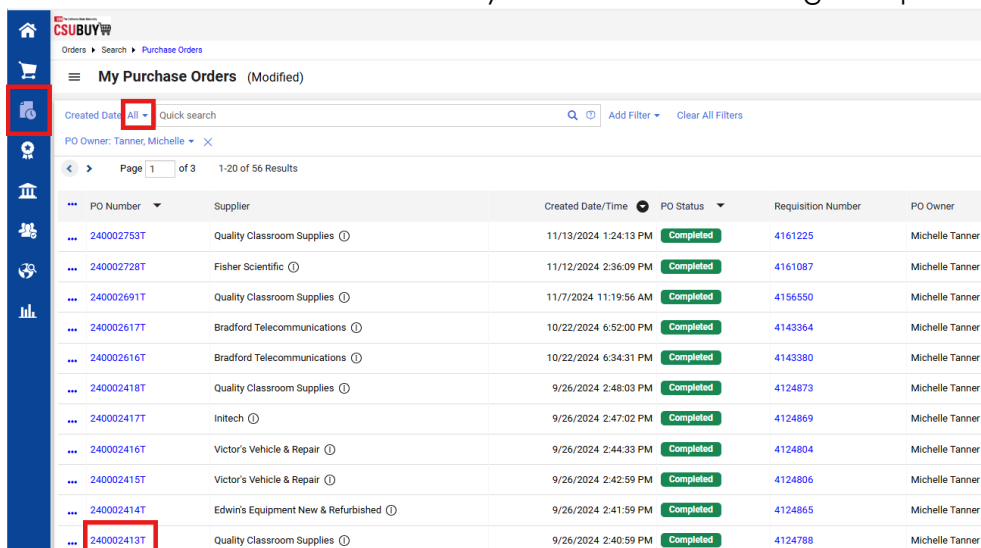
17. Complete the form fields. Once on the Review and Submit page, click on the drop down for Add and go to Cart and select Add to Draft Change Request.



18. A list of change requests in Draft status that are owned by the logged-in user, with the same supplier as the item(s) to be added is displayed. Select a change request and click "Add to Change Request". An error message is displayed if there are no suitable change requests.



19. Return to the Purchase Order you initiated the Change Request for and open it.



20. Click on the Change Request tab and open the Change Request.

The screenshot shows the CSUBUY system interface. At the top, there is a navigation bar with the CSUBUY logo and the text "Purchase Order • Quality Classroom Supplies • 240002413T Revision 0". Below this, there is a horizontal menu with tabs: Status, Summary, Revisions (1), Confirmations, Shipments, Change Requests (1), Receipts (1), and Vouchers (2). The "Change Requests" tab is highlighted with a red box. Below the menu, there is a section titled "Records found: 1" which contains a table with the following data:

Status	Number	Owner	Created
Draft	4206820	Michelle Tanner	1/22/2025

21. Review the newly added line and details. If you need to make changes to the chartfield, follow steps 6-7 above. Once finished, continue with steps 12-13 above to complete the process.